

**Talent Search (TS) and Educational Opportunity Centers (EOC) Programs
Instructions for Completing the Annual Performance Report
For Program Year 2003-2004**

1. WHAT IS THIS PACKAGE?

This package contains the instructions needed to prepare the annual performance report for the Talent Search and Educational Opportunity Centers programs. The Department of Education uses the information provided in the performance report to assess a grantee's progress in meeting its approved goals and objectives and to determine a grantee's prior experience points in accordance with the program regulations (34 CFR 643.22 – Talent Search; and 34 CFR 644.22 – Educational Opportunity Centers).

2. WHAT ARE THE LEGISLATIVE AND REGULATORY AUTHORITIES TO COLLECT THIS INFORMATION?

- Title IV, Section 402B and 402F, of the Higher Education Act of 1965, as amended (Public Law 102-325);
- Program regulations in 34 CFR Part 643 for Talent Search and 34 CFR Part 644 for Educational Opportunity Centers; and
- Sections 75.590 and 75.720 of the Education Department General Administrative Regulations (EDGAR)

3. WHO MUST FILE THIS REPORT?

All grantees funded under the Talent Search and Educational Opportunity Centers programs must submit annual performance reports as a condition of grant award.

4. WHAT PERIOD OF TIME IS COVERED IN THE REPORT?

The report covers the 12-month grant (budget) period. This information can be found in Block 6 of the Grant Award Notification.

5. WHAT INFORMATION MUST BE SUBMITTED?

The report consists of four sections. Section I requests project identifying information; Section II requests demographic information on project participants; Section III requests information on project performance outcomes; and Section IV requests a brief narrative summary of other project objectives and accomplishments.

6. WHEN SHOULD THE REPORT BE FILED?

The annual performance report should be submitted electronically via the World Wide Web within 90 days after the end of each 12-month grant (budget) period.

7. HOW MAY THE REPORT BE SUBMITTED?

The entire report should be submitted via the World Wide Web. In addition, a grantee must submit, via fax, a signed copy of Section I of the report form that certifies that the information submitted electronically is accurate, complete, and readily verifiable.

The Web application will be available from October 18 to November 30, 2004 at the following Web address:

<http://www.ed.gov/programs/triotalent/report.html> (for TS)

<http://www.ed.gov/programs/trioeoc/report.html> (for EOC)

The Web site contains the forms and instructions needed to prepare and **submit online** the annual performance report for the Talent Search (TS) and Educational Opportunity Centers (EOC) programs. The Web application that TS and EOC grantees will use to submit the annual performance report has the following features:

- Instructions for using the Website, an introduction to the data collection, and Online Help;
- A Web form for completing Sections I through III online;
- Functionality to upload an electronic file with the narrative summary of other project objectives and outcomes (Section IV);
- A print button to make a hard copy of the information entered;
- A submit button to send the entire report to the Department of Education; and
- An e-mail confirmation that the report has been submitted (if an e-mail address is provided when completing Section I)

8. WHO MAY BE CONTACTED FOR ADDITIONAL INFORMATION CONCERNING THE SUBMISSION OF THE PERFORMANCE REPORT?

Please contact your program specialist directly if you have questions regarding the performance report requirements or if you need to revise the performance report submission. A state listing of program specialists'

names, telephone numbers, and email addresses is available at the Web address provided above.

If you have technical problems accessing the Web site or using the Web application, please contact the Help Desk by either telephone (703) 846-8233 X 247 or e-mail at TSWEB@cbmiweb.com.

**Talent Search (TS) and Educational Opportunity Centers (EOC) Programs
Specific Instructions for Completing the Performance Report**

Section I: Project Identification, Certification, and Warning

A. Identification

1. To begin completing this report online, you will need to enter your PR/Award Number and your password in the boxes provided on the Web page and then click login. You will then be asked to confirm that the PR/Award number and associated grantee name are correct. After completing this, the PR/Award number will be automatically inserted into line 1 of Section I of the report form. Your project's PR/Award number begins with the letter "P" and is eleven digits in length. This number can be found in Block 5 of the Grant Award Notification.
2. The name of the organization awarded the grant funds will be automatically inserted into line 2.
3. The address of the grantee organization will be automatically inserted. If changes are needed, please correct the data.
4. The name of the project director will be automatically inserted. If there has been a change in the project director, please update this field.
5. Provide the current telephone number, fax number and electronic mailing address for the project director.
6. The project period covered by this report will automatically be inserted. These dates should correspond to the budget period found in Block 6 of the Grant Award Notification.
7. The type of report being submitted will be inserted automatically based on the project's PR/Award number. If you have both a Talent Search and Educational Opportunity Centers project, you must submit separate reports for each project.
8. Provide the name, telephone number, and electronic mailing address for the data entry person who has completed the online form.

B. Certification

The project director is the person responsible for administering the project in accordance with the terms and conditions of the grant.

The certifying official is the individual (successor or designee) who signed the grant application on behalf of the institution or agency.

C. Warnings

Any person who knowingly makes a false statement or misrepresentation on this report is subject to penalties which may include fines, imprisonment, or both, under the United States Criminal Code and 20 U.S.C. 1097. Further Federal funds or other benefits may be withheld under these programs unless this report is completed and filed as required by existing law (20 U.S.C. 1231a) and regulations (34 CFR 75.590 and 75.720).

Section II: Demographic Profile of Project Participants

Number of Participants Funded to Serve

In accordance with section 643.22 (b)(1) of the Talent Search regulations and section 644.22 (b)(1) of the Educational Opportunity Centers regulations, please provide the number of participants your project was funded to serve during this reporting period.

Number of “College Ready” Participants Served

For Talent Search projects, a “college ready” project participant includes 12th grade high school students and high school (and high school equivalency) graduates. For EOC projects, a “college ready” participant is a person who has graduated from high school or a high school equivalency program and who the grantee has determined possess the skills necessary to succeed in postsecondary education.

A. Number of Participants Assisted

In completing this section of the report, please keep in mind the following definitions of a project participant provided in the program regulations in 34 CFR 643.7 (Talent Search) and 34 CFR 644.7 (Educational Opportunity Centers).

A **Talent Search participant** means an individual who: (1) is determined to be eligible to participate in the project under section 643.3; and (2) receives project services designed for his or her age or grade.

An **Educational Opportunity Centers participant** means an individual who: (1) is determined to be eligible to participate in the project under section 644.3; and (2) receives project services.

Only those individuals who meet the definitions of participants should be counted in this section of the report.

For Talent Search and Educational Opportunity Centers projects that serve participants for more than one year, provide separate counts of the number of new and continuing participants in A1 and A2. Otherwise, just provide the total number of participants in A3. A new participant is one served by the project for the first time during this reporting period. A continuing participant is one who was served by the project for the first time in another reporting period (this includes a reporting period under a previous grant) and who received project services during this reporting period.

A3 should be the total of A1 and A2, if applicable, and should be the number of participants served by the project during the reporting period.

B. Participant Distribution by Eligibility

The statute and regulations governing the Talent Search and Educational Opportunity Centers programs require that an individual, at the time of initial selection for the project, must be a “low-income individual,” a “potential first generation college student,” or be in need of project services. (These terms are defined below.) At least two-thirds of project participants each year must be both low-income and potential first-generation college students; the remaining participants can be either low-income individuals, potential first-generation college students, or any individuals in need of services. Students may be counted only once in this breakout. The total reported must agree with the number in “A3” above.

Low-income individual means an individual whose family’s taxable income did not exceed 150 percent of the poverty level amount in the calendar year preceding the year in which the individual initially participated in the project. The poverty level amount is determined using criteria of poverty established by the Bureau of the Census of the U.S. Department of Commerce.

Potential first generation college student means (1) an individual neither of whose natural or adoptive parents received a baccalaureate degree; or (2) an individual who, prior to the age of 18, regularly resided with and received support from only one parent and whose supporting parent did not receive a baccalaureate degree; or (3) an individual who, prior to the age of 18, did not regularly reside with or receive support from a natural or adoptive parent.

In the Other category (B4), count those project participants who are neither low-income nor potential first-generation college students. The total should agree with the number in “A3.”

C. Participant Distribution by Ethnic Background

These data are not mandatory but are extremely helpful to the Department in reporting on the ethnic characteristics of participants served by the program. The total should agree with the number in “A3.”

The race/ethnicity categories used in this section are consistent with the Department of Education’s policy on the collection of racial and ethnic information. These categories are defined as follows: **American Indian or Alaska Native** - A person having origins in any of the original peoples of North America, and who maintains cultural identification through tribal affiliations or community recognition. **Asian** - A person having origins in any of the original peoples of the Far East, Southeast Asia, and the Indian subcontinent. This area includes, for example, China, India, Japan, Korea, and the Philippine Islands. **Black or African American** - A person having origins in any of the black racial

groups of Africa. **Hispanic or Latino** - A person of Mexican, Puerto Rican, Cuban, Central or South American or other Spanish culture or origin, regardless of race. **White** - A person having origins in any of the original peoples of Europe, North Africa, or the Middle East. **Native Hawaiian or Other Pacific Islander** – A person having origins in any of the original peoples of Hawaii or other Pacific islands such as Samoa and Guam. For those participants of a multi-racial background, include them in C7 for **More than one race reported**. Line C8, **Not reported**, is for those individuals who did not provide this information. The total should agree with the number in “A3.”

D. Participant Distribution by Gender

As noted above, though these data are not mandatory, they are helpful to the Department in reporting on the gender representation of project participants. The total should agree with the number in “A3.”

E. Participant Distribution by Age

The data requested here represent age ranges most consistent with age groups targeted for services by the Talent Search and Educational Opportunity Centers programs statute and regulations. Given the different age limitations in the two programs as well as the permissible exceptions provided by statute, this information aids the Department in validating the numbers of middle school students, secondary school students, youth, and adults served by each project. The total should agree with the number in “A3.”

The data reported here should reflect the age of project participants at the **beginning of the reporting period**. For a new participant, not in school at the beginning of the report period, report on the age of the participant at the time that individual is selected to participate in the project.

F. Grade Level Distribution of Secondary School Students

The data reported here should reflect the grade level of project participants who are secondary school students (or secondary school dropouts) at the **beginning of the reporting period**. For new project participants served after the beginning of the reporting period, report the grade level of the participant at the time the individual was selected to participate in the project.

F1. Middle school (TS only) -- Report in this category the number of project participants in grades six, seven, and eight at the beginning of the reporting period.

F2. High school (9th-11th grade) -- Report in this category the number of project participants in grades nine, ten, and eleven at the beginning of the reporting period. Include twelfth graders on line F3.

Note: Some school districts include ninth grade as part of the junior high school. However, for consistent national data collection and reporting please use the definitions provided.

F3. High school (12th grade only) -- Report in this category the number of project participants who were high school seniors at the beginning of the reporting period.

F4. Secondary school dropout -- Report in this category the number of project participants who, at the beginning of the reporting period, had dropped out or were officially dismissed from their secondary school before receiving a high school diploma or completing a high school equivalency program. Count in this category only those individuals who are not older than 18.

A secondary school means a school that provides secondary education as determined under applicable State law, except that it does not include education beyond grade 12.

G. Educational Status of Project Participants Not in Secondary School

G1. Adult without high school credential -- Report in this category the number of project participants who, at the beginning of the reporting period, had not received a high school diploma or completed a high school equivalency program and who are 19 or older.

G2. High school (or GED) graduate -- Report in this category the number of project participants who, at the beginning of the reporting period, had already obtained a high school diploma or completed a high school equivalency program.

G3. Postsecondary stopout -- Report in this category the number of project participants, who at the beginning of the reporting period, had been enrolled in a program of postsecondary education but had halted their studies prior to obtaining a certificate or degree.

G4. Postsecondary student (EOC only) -- Report in this category the number of project participants enrolled in programs of postsecondary education at the beginning of the reporting period.

G5. Postsecondary transfer -- Report in this category the number of project participants who have already obtained a certificate or a two-year degree but demonstrate an interest in further postsecondary study (e.g., second associate's degree, transfer from two-year to four-year degree program).

Note: The sum of Sections II, F5 and G6 should equal the total number of participants reported in Section II, A3.

H. Veterans Served

Provide the number of veterans served by the project. The definition of a veteran is found in the Talent Search regulations in 34 CFR 643.7 and in the Educational Opportunity Centers regulations in 34 CFR 644.7.

I. Participants of Limited English Proficiency

Talent Search and Educational Opportunity Centers projects may adapt project services to meet the needs of students of limited English proficiency. If applicable for your project, please provide the number of project participants with limited English proficiency.

Limited English proficiency, with reference to an individual, means a person whose native language is other than English and who has sufficient difficulty speaking, reading, writing, or understanding the English language to deny that individual the opportunity to learn successfully in classrooms in which English is the language of instruction.

J. List of Target Schools

Please provide the following information for **each** secondary school served by your Talent Search project (or Educational Opportunity Centers project, if applicable) during the reporting period: the name of the target school; the city; the state; and zip code.

A target school means a school designated by the grantee as a focus of project services.

Section III: Project Performance Outcomes

This section of the annual report is your opportunity to report on your project's progress in meeting its approved objectives related to the goals of the programs and that respond to the prior experience criteria contained in the program regulations (34 CFR 643.22 – Talent Search; and 34 CFR 644.22 – Educational Opportunity Centers). Keep in mind that the annual performance report will be used to award prior experience points, so it is imperative that you provide sufficient information to determine your project's success in meeting the purposes of the Talent Search and Educational Opportunity Centers programs.

In this section, please enter in quantifiable terms your approved objectives (i.e., those originally established in your grant application or revised with written approval from your program specialist) related to each of the prior experience criteria (percentages of participants). **Do not change the approved objectives to coincide with your actual performance.** You will demonstrate the extent to which your project achieved each of these

objectives by providing the requested data under “Participant Status.” To facilitate the data collection, you must enter a positive numeric value in each field. For those data fields that are not applicable to your project, please enter a zero.

A. Secondary School Promotion, Graduation, and Re-Entry

All Talent Search projects (and those EOC projects approved to serve secondary school students) should complete this part of the report.

Please list the approved project objectives for secondary school promotion, graduation, and re-entry, if applicable, in measurable terms.

The promotion objective should include all non-senior secondary students (middle and high school) to be served by the project and estimate the percentage that will be promoted to the next grade level at the end of the academic (school) year.

The graduation objective should project the percentage of high school seniors (and GED students or alternative education students not older than 18 served by the project that will receive a high school diploma or complete a high school equivalency program during the reporting period.

The re-entry objective should project the percentage of secondary school dropouts (not older than 18) to be served by the project who will re-enter high school or enroll in a high school equivalency program during the reporting period.

Participant Status

All data provided should reflect the educational status of secondary school participants at the end of the reporting period or for the fall term.

A1. Promoted to next grade in middle school -- Report on the number of middle school participants who have advanced to the next grade level in middle school. For example, report on all students who have passed from 6th grade to 7th grade, and 7th grade to 8th grade.

A2. Promoted from middle school to high school -- Report on the number of middle school participants who have advanced to high school. **Include participants entering the ninth grade.**

A3. Promoted to next grade in high school -- Report on the number of high school participants who have advanced to the next grade level in high school. For example, report on all students who have passed from 9th grade to 10th grade, 10th grade to 11th grade, and 11th grade to 12th grade. **Do not include those participants who have graduated.**

A4. Retained in current grade in middle school -- Report on the number of middle school participants who did not advance to the next grade level by the end of the academic (school) year.

A5. Retained in current grade in high school -- Report on the number of high school participants who did not advance to the next grade level by the end of the academic (school) year.

A6. Dropped out of middle school -- Report on the number of middle school participants who dropped out of school during the reporting period.

A7. Dropped out of high school -- Report on the number of high school participants who dropped out of school during the reporting period. Include those who joined the military or sought employment before completing high school or a high school equivalency program.

A8. Re-entered secondary school -- Report on the number of participants (not older than 18) who re-entered middle or high school or a GED or other educational program during the reporting period or for the fall term.

A9. Received high school diploma -- Report on number of project participants who graduated from high school during the reporting period.

A10. Obtained a GED/high school equivalency credential -- Report on the number of participants (not older than 18) who have completed requirements to obtain a certificate of high school equivalency.

A11. Other -- Report here on the number of middle and high school participants whose status does not fall within any of the other categories. This would include any participants who have died during the reporting period and participants who were secondary school dropouts at the beginning of the reporting period who did not re-enter secondary school or a GED/high school equivalency program during the reporting period.

A12. Unknown -- Report here on the number of middle and high school participants whose educational status at the end of the reporting period is either unknown or unconfirmed.

A13. Total -- The total should equal the total number of secondary school participants reported in Section II, F5.

Note: For secondary school dropouts reported in Section II, F4, report the end of the reporting year status of these individuals in one of seven categories (A6 through A12).

A6 or A7 (whichever applies) if the participant re-entered secondary school or enrolled in a high school equivalency program, but again left school without a diploma or left the equivalency program without an equivalency certificate.

A8 if the participant re-entered secondary school or enrolled in a high school equivalency program, and intends to finish school or the program, but did not receive a diploma or equivalency degree by the end of the reporting period.

A9 if the participant re-entered secondary school and graduated.

A10 if the participant enrolled in a high school equivalency program and obtained an equivalency certificate.

A11 if the participant never re-enrolled in high school or undertook an equivalency program.

A12 if the participant's educational status at the end of the reporting period is either unknown or unconfirmed.

B. Admission and Financial Aid Assistance

This part of the report should be completed by all Talent Search and Educational Opportunity Centers projects.

Please list the approved project objectives for providing project participants assistance in applying for admissions and student financial aid.

Number of Participants Assisted

B1. Applied for postsecondary admission -- Report on the number of participants who applied for admission to a program of postsecondary education. Do not include in this field high school students who are taking postsecondary courses while still in high school.

B2. Applied for student financial aid -- Report on the number of participants who applied for student financial aid. This includes scholarship applications, U.S. Department of Education federal student financial aid forms, and state applications for financial aid.

C. Postsecondary Admission and Re-Entry

This part of the report should be completed by all Talent Search and Educational Opportunity Centers projects.

Please list the approved project objectives for postsecondary admission, re-entry/transfer, and persistence/completion in measurable terms.

Participant Status

All data provided should reflect the educational status of project participants at the end of the report period or the beginning of the fall academic term.

C1. Postsecondary admission -- Report on the number of “college ready” project participants who enrolled in programs of postsecondary education for the first time during this reporting period or have been admitted for the next academic term. Do not include in this field high school students who are taking postsecondary courses while still in high school.

C2. Postsecondary re-entry/transfer -- Report on the number of participants who halted their educational progress towards a postsecondary degree and those participants wishing to transfer to another institution or postsecondary program who re-enrolled in a program of postsecondary education during the reporting period or have been re-admitted for the fall academic term.

C3. Postsecondary persistence/completion (EOC only) -- Report on the number of participants who were in programs of postsecondary education at the beginning of the reporting period and have continued in or completed a program of postsecondary education during this reporting period.

Note: Do not include enlistment in the armed services as a postsecondary outcome. Enlisting in the military, while a worthwhile goal for many participants, **is not considered a program of postsecondary education.** However, enrollment at a military college or academy (e.g., West Point Academy or the Naval Academy at Annapolis) is considered a postsecondary educational program.

Status of Remaining Students not in Postsecondary School

C4. High school graduate not enrolled in program of postsecondary education -- Report on the number of participants who graduated from high school (or completed a high school equivalency program) during the reporting year but who did not enroll in a program of postsecondary education during the project period (or for the fall term).

C5. Withdrew from program of postsecondary education -- Report on the number of postsecondary students and postsecondary transfer students who chose to end or interrupt their educational plans before obtaining a certificate or degree (or for transfer participants a second degree) from a postsecondary institution.

C6. Other -- Report on the number of participants whose status does not fall within any of the other categories. This would include any participants who have died during the reporting period, adults without high school credentials who did

not enroll in a program of postsecondary education during the reporting period, and any 12th grader who did not complete secondary school during the reporting period.

C7. Unknown -- Report here on the number of participants 19 years or older whose educational status at the end of the reporting period is either unknown or unconfirmed.

C8. Total -- The total should equal the total number of participants reported in Section II, G6 and the number of 12th grade students reported in Section II, F3.

D. Postsecondary Placements (Types Of Institutions)

For those project participants enrolled in, admitted to, or continuing in a program of postsecondary education as reported in Section III, C1, C2, and C3 above, indicate the number of participants by type of postsecondary institution.

Section IV: Summary of Other Project Accomplishments

In this section **briefly** describe approved project objectives **not covered in other sections** of this document and report on the extent to which your project achieved each of the objectives. The following is a suggested format for reporting on your other project objectives:

OBJECTIVE	OUTCOME
75% of middle school participants will participate in career exploration activities by the end of the reporting period.	_____ (#) and _____ (%) of middle school participants participated in career exploration activities during the reporting period.

Provide specific information and data to support the accomplishment of each objective. If you did not meet one or more of these objectives or one or more of the objectives reported in Section III, please give a brief explanation of the causes and how you will improve on the performance in the next project (reporting) period.

Also report on any approved or proposed changes to the project objectives, activities, and services for the next reporting period. Discuss any significant personnel changes and the impact of these changes on project operations. Report briefly on the status of grant funds for the reporting period, including any unexpended and/or carryover funds.